



Introducing Premium Services

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Introducing Premium Services - Objectives

Today's Presenter:

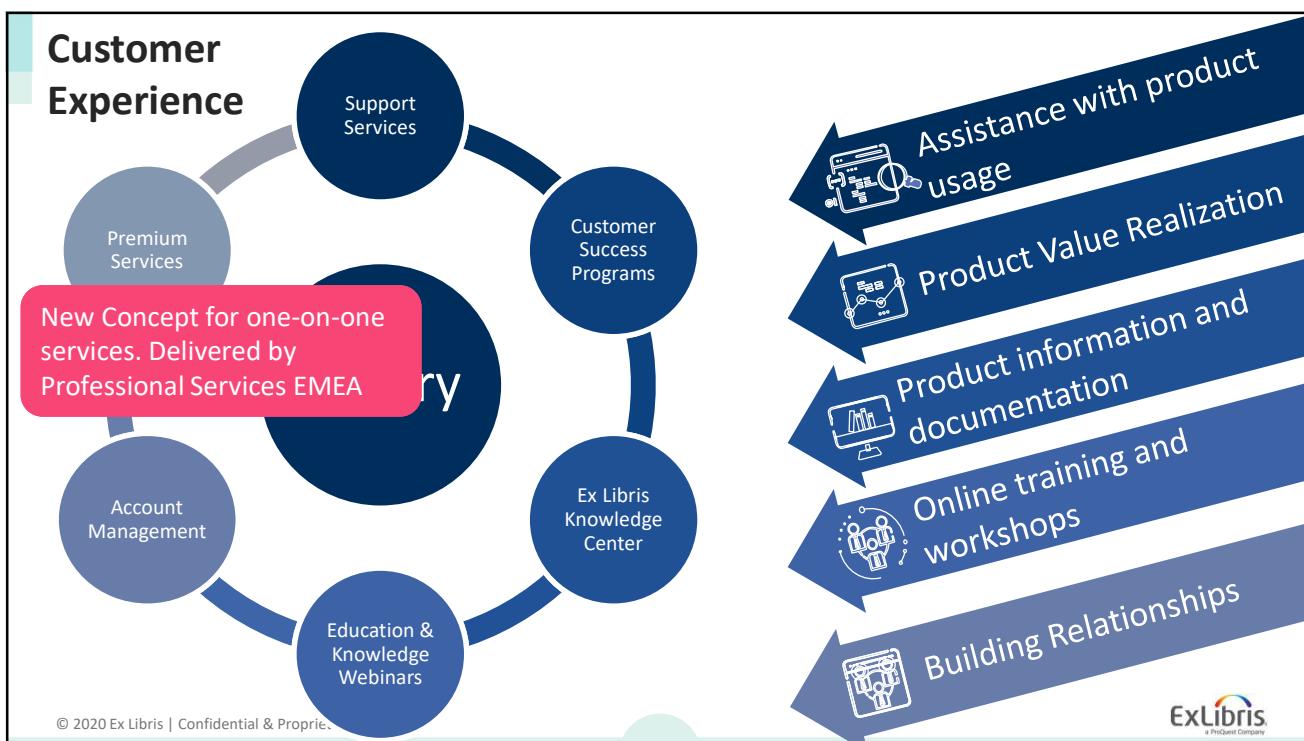


What are Premium Services?

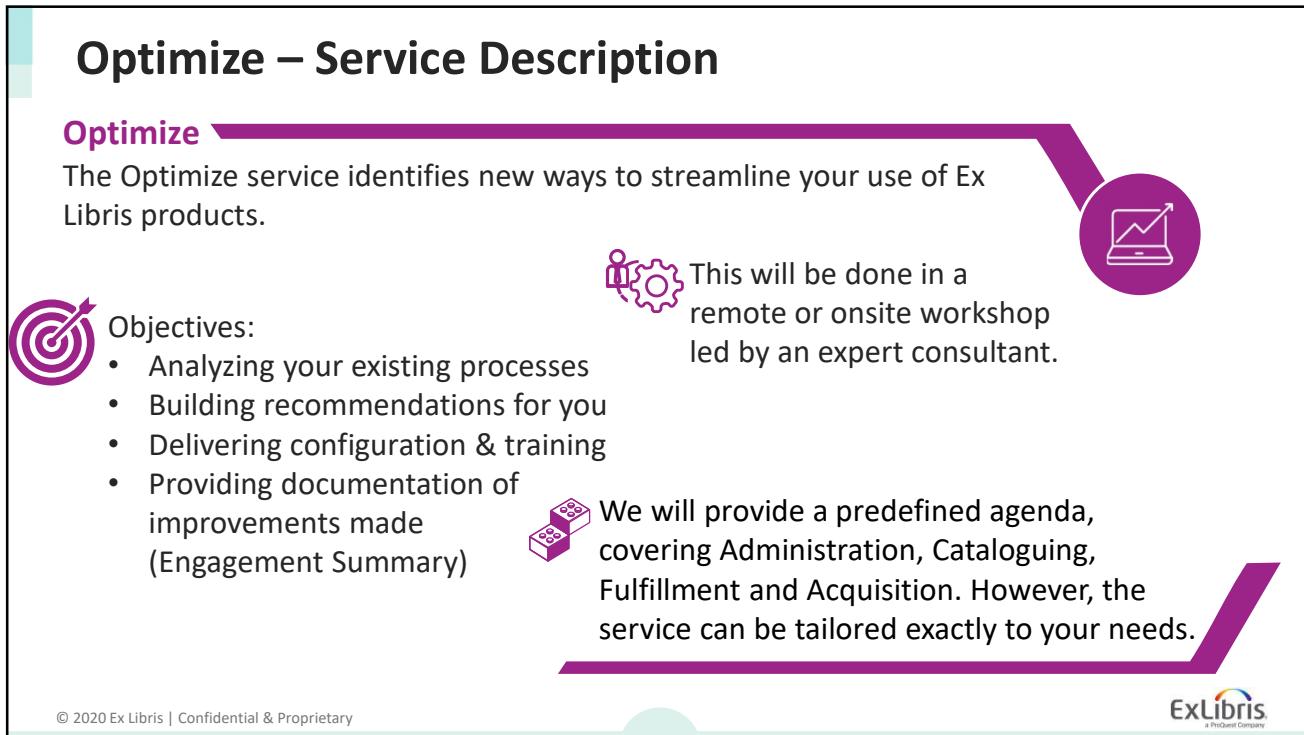
- What types of engagement are included
- What does each engagement type offer
- How to request Premium Services

Danny Bortey

Implementation Services Director



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Optimize – Real Life Examples



- Talking through workflows with an expert will highlight misunderstandings about system functionality
 - “Placing requests for patrons takes too long” -> Change the workflow by placing requests from search results instead of through Patron Services workbench
 - “We have to take 10 clicks to move an invoice from creation to paid” -> Disable invoice review and approval rules. Disable payment configurations. What was multiple steps is now one: Invoice creation and save.
- Better utilization of Alma functionality to gain efficiencies and eliminate 3rd party solutions
 - Utilizing Purchase Requests for materials that need to be purchased for Course Reserves instead of spreadsheets and emails.
 - Work Orders to manage missing item searches
 - Electronic Activation tasks to troubleshoot problems with electronic resource access
 - Scheduled Analytics reports for statistics. Create reports once and Alma sends the reports to relevant parties on a monthly basis
- Streamline workflows
 - Give electronic resources staff the ability to create purchase order lines, eliminating multiple passes between acquisitions and electronic resources. The staff that know best what resources should be ordered are the ones placing the orders from the Community Zone.

Extend - Service Description

Extend



You may be aware of new or unused system functionality, but need help setting it up. If so, the Extend service is perfect for you.



Typical Objectives:

- Demonstrating the configuration, integration or product feature to you
- Helping to define policies and workflows
- Training your staff in using and maintaining the functionality
- Provide documentation (Engagement Summary)



This will be done in a remote or onsite session led by an expert consultant.



Examples:

- Getting started with Resource Sharing – configuration of the required workflows and administration training
- Integrating an additional external data source in Primo

Educate - Service Description

Educate

The Educate service helps your library strengthen your knowledge of Ex Libris product functionality.



A

Training sessions can be chosen from a menu of available sessions.

B

Or an Ex Libris consultant will work with you to design and deliver targeted training based on your specific needs.



Trainings will be delivered in remote or onsite sessions led by an expert consultant.



Examples:

- Of-the-shelf trainings sessions for Alma from the Educate-Menu
- Customized 1:1 Analytics training
- A workshop for new staff members

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Educate Menus

Pick and choose

Choose a minimum of 4 sessions

Full menu – all sessions of a menu delivered over a 3-day workshop

Alma Menu

- Alma Overview
- Technical Services Overview
- Ordering Workflows
- Receiving and Activation
- Invoicing
-

Primo Menu

- Introduction to Discovery
- How Primo Works
- Search Configuration
- Search Interfaces
- Branding, CSS, HTML
-

Analytics Menu

- Alma Analytics for Beginners
- Day-to-Day Acquisitions Reporting
- Reporting on Day-to-Day Fulfillment Activities
- Starting with Analytics to Understand and Manage Physical Resources
-

Leganto Menu

-

Coming soon!

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Educate – Customized Trainings

Alma Menu

- Alma Overview
- Technical Services Overview
- Ordering Workflows
- Receiving and Activation
- Invoicing
-

Primo Menu

- Introduction to Discovery
- How Primo Works
- Search Configuration
- Search Interfaces
- Branding, CSS, HTML
-

Analytics Menu

- Alma Analytics
- Data Services

Leganto Menu

-



**Customized
trainings designed
for specific needs.**

**We will work with you to design and deliver
targeted training based on your requirements.**

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Additional Services



There may be other services not covered by the aforementioned engagement types which may require the expertise and help from Ex Libris.

These may be data related services, help with topology changes, consultancy for complex problems, support with technical expertise or any other customized service.



Examples:

- A multi-campus setup in Primo VE
- Help manipulating data using APIs
- Assistance with normalization rules

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Premium Services Overview



Types of Engagements

- Optimize
- Extend
- Educate
- Other Services



Service Delivery

- Trainings & Workshops
- Hands-on Configuration
- Consultation
- Creation of Documentation
- And more...



Types of Delivery

- 1-1 service to your institution
- Onsite or Remote



Supported Languages

- English, French, German, Italian, Spanish (Polish in preparation)



Rates

- Individual Services - according to service scope
- Pre-defined Services - according to catalogue pricing

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How to find out more about Premium Services



Contact Premium.Services@exlibrisgroup.com

We're happy to have a call to discuss your needs



Or reach out to your Software Sales Specialist
or Account Manager



[Premium Services - Ex Libris Knowledge Center](#)

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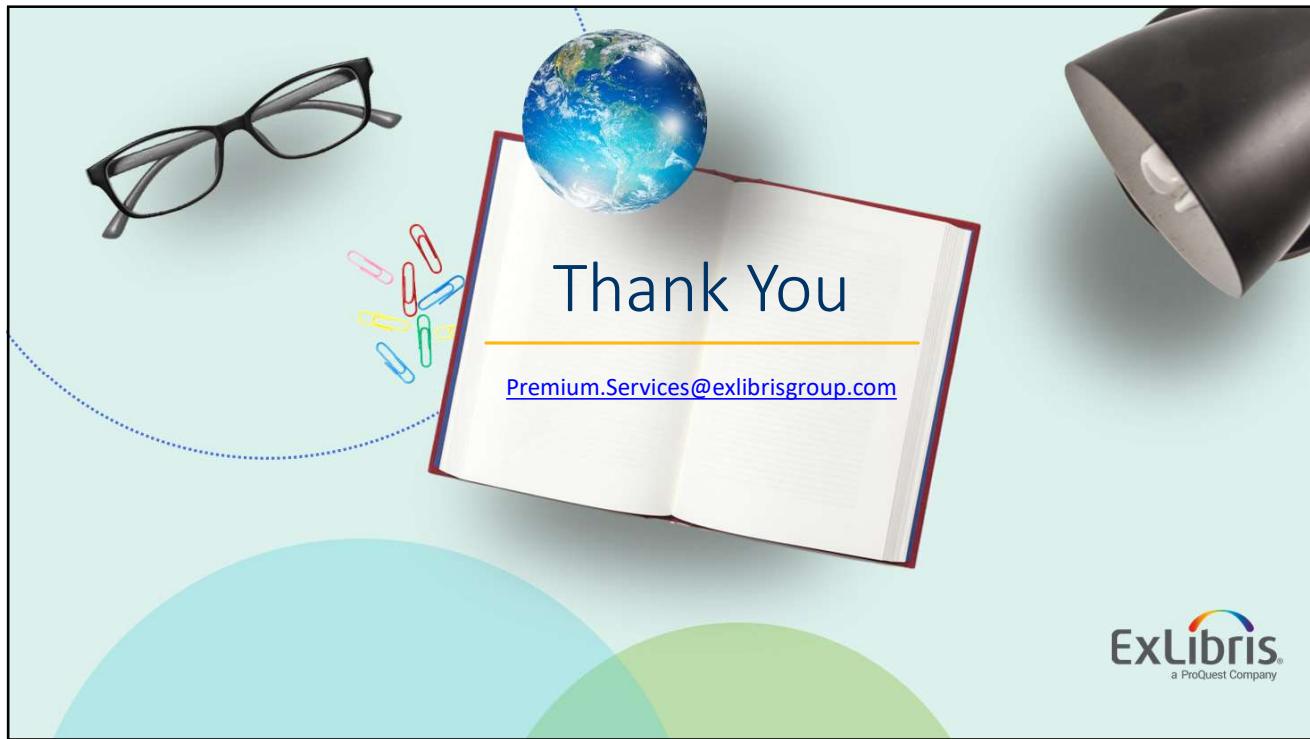
Q&A

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